



The Community
Foundation of
Shelby County

2021

REPORT TO THE COMMUNITY



Cindy Helman
Chair



Marian Spicer
Executive Director

Welcome

More than any other kind of nonprofit, a community foundation has the ability to help a region build long-term community wealth. That wealth is returned to the area every year through grants and scholarships from each of the more than 215 charitable funds we administer.

The Community Foundation of Shelby County has the ability to keep even the oldest charitable wish current, to engage donors in new community efforts and to serve as a partner for people and organizations that want to improve Shelby County.

You are the one who molds what is supported by charitable funds. Serving your charitable goals is the reason we exist. As we approach our 70th year, know that we are grateful for this opportunity!

Welcome to this glimpse into your Community Foundation.

Cindy Helman
Chair

Marian Spicer
Executive Director



Our Mission is to cultivate, administer, and distribute legacy gifts for the benefit of our community.

www.commfoun.com



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Your gifts during Match Day 2020 were distributed to 18 organizations. Marian Spicer, Executive Director, and Jessica Fortkamp, Donor Relations Director, proudly show your grand total.

Joyful noise at Y Childcare thanks to a Community Grant you supported for musical instruments.



The Community Foundation is Your Foundation

We appreciate you and the many ways you support the community through the Community Foundation of Shelby County. Whether establishing a new charitable fund, giving to an existing one, becoming a Partner or supporting a charity during Match Day, you make us make a difference. Thank you for everything you do to help others!

Granting Funds

Of the 215 charitable funds housed within the Community Foundation of Shelby County, 132 were created by individuals and families to send grants to charities they have identified. Some charities will receive a one-time grant, other receive multiple, periodic grants that will continue long into the future.

What charities do the work you value? You can help them today and tomorrow by creating a fund that gives those organizations the resources to carry on their important work.

Scholarships

When you create a scholarship fund, the invested assets generate a scholarship year after year. Graduating high school seniors, current college student completing their degree and young adults pursuing a skilled education all need your help to better afford schooling.

Whether a single scholarship or one that renews to support additional years, you can empower students to achieve a better job and a better life. In 2021, 76 scholarship funds within the Community Foundation awarded more than \$241,000 in scholarships.

Community Granting

Many give to help our discretionary granting program, known as Community Grants, award sums based upon proposals submitted by local organizations. Seven charitable funds give full or limited ability for grants targeting ever-changing needs in the Shelby County community. Your gift to the annual Community Foundation Partners program also supports Community Grants.

Last year, grants supported temporary housing for the homeless, kitchen equipment for meal programs, a vehicle to transport domestic violence victims, simple musical instruments for kids at Y Childcare and so much more! Community Granting funds are flexible and always ready to support changing needs and opportunities.

Match Day

Your gift during the annual Community Foundation Match Day may be doubled to help one or more participating charities. Held on the national Giving Tuesday (the Tuesday after Thanksgiving) it's an enthusiastic event that lets you help charities meet and exceed a goal of \$5,000 in matching money. Last year, it was inspiring to watch more than \$476,000 raised for the 18 participating charities. Every dollar matters and every gift helps your favorite charity receive the full matching amount. Gifts may be made by writing a check to the Community Foundation of Shelby County or by credit card on our website at commfoun.com

2021 Community Foundation Partners

THANK YOU PARTNERS for your gifts that support the annual Community Grants program. You are the resource for more than \$35,000 in grants awarded to local organizations addressing local problems and opportunities. New Partners are welcome any time.

John and Tara Adams
Airstream, Inc
Larry and Diane Alexander
Larry and Ann Allen
Jon and Libby Allison
Anonymous (2)
Area Energy & Electric, Inc
Amy Ayers
Bob and Beth Baird
D. Jay and Peggy Baird
Steve and Peggy Baker
TJ and Karen Baker
Mike and Karen Ballas
Doug and Sara Barhorst
Kurt and Connie Barhorst
Mike and Jenny Barhorst
Ted Barhorst
Julia Barker
Scott Barr
Thomas Behr
Janice Benanzer
Dan and Lori Bensman
Gary and Emmy Bensman
Evie Bensman
Douglas Benson
John Bertsch
Sara Bertsch
Tim Bickel
Judy Blackford
Rodney R. Blake
Steve and Susan Blatchly
Phyllis Blust
Tom and Sondra Boecker
John & Eileen Boeckman
Joan Boltz
Doug and Beth Borchers
Ed Borchers
Tony and Joyce Bornhorst
Bruce and Judi Boyd
Fran Brockman
Cassano's
Bernard and Phyllis Clinehens
John E. Coffield
Teresa Coffield
Andy and Michelle Counts
Kent and Darlene Craver
Creative Marketing Strategies, Inc
Keith and Joyce Daniel
Jim and Janice Davis
Bill and Doris Deam
Mark and Joyce Deam
John and Betsy Deeds
Detailed Machining Inc
Pete and Diane Dexter
Sondra R. Dunham
John and Nettie Dunlap
Bob and Shirley Eck

David C. Edwards
Gloria Elsass
Nila Elsass
Larry and Karen Elsner
Emily Esau
Bonnie Faulkner
Jayne Felgen
Dick and Marla Flinn
Evelyn Flock
David and Katherine Fogt
Leoma Fogt
Lois M. Fogt
Doug and Jessica Fortkamp
Dave and Cheryl Fortney
Dan and Jill Francis
John and Becky Francis
Ken and Julie Francis
Larry and Barbara Francis
Hilda Francis
Ronald and Patricia Francis
John and Julia Frantz
Thomas and Joyce Frantz
Rob and Sue Fridley
Mark and Jackie Fullenkamp
Nick and Stephanie Fullenkamp
Virgil and Lucy Fullenkamp
John and Debra Garmhausen
Gehret Funeral Home
Tim and Marla Geise
Frank and Julie Gilardi
Phil and Trina Gilardi
Mick and Vickie Given
Don and Bev Goettemoeller
Russell and Rene Gottemoeller
Ed and Karen Green
David and Jean Gross
Bob and Bonnie Guillozet
Brenda Hall
James and Joan Hall
Jim and Judy Harvey
Lola N. Heintz
Dan and Jill Heitmeyer
Jeff and Cindy Helman
Terry Helman
Hemmelmarn Services, Inc
Richard Henke
Randy A. Herron
Randy and Sandy Hoehne
William and Lisa Hoewischer
Mark and Kristy Hoge
Richard and Mary Lou Holly
Robert and Jeanne Hoying
Phil and Mary Kaye Huecker
Wilbur and Betty Hughes
Michael Jannides
Lora Kaufman
Sue Kaufman

Tim and Dee Kearns
Ralph and Clara Keister
Rudy and Rhonda Keister
Daniel and Barbara Knasel
Steve and Rosemary Knouff
Steve Krivacek
Joe and Shannon Lachey
Phillip Lahrmer
Ron and June Laughlin
Alan and Donna Laws
John and Edna Mae Laws
Bruce and Lynn Lindsey
Mike and Annette Lochard
Yvonne Lochard
Bryson and Tiffany Long
Dean and Linda Long
Dick and Suzie Martin
Tom and Angela Martin
Blanche McClain
Bob and Kathy McDevitt
Cynthia F. McRill
Linda Meininger
Carole Mestemaker
Chris and Chris Meyer
Tom and Barb Meyer
Tom and Diane Meyer
Cheryl Michael
Dave and Connie Mielke
Ed and Kay Miller
Doug Millhoff
Tom and Mardie Milligan
Sara Mitchell
Dave and Ann Monnier
Ken and Mary Beth Monnier
Dave and Sandy Monnin
Mike and Bonnie Monnin
Dale and Kathy Nichols
David and Emily O'Leary
Glen and Vanis Phillips
Thomas and Donna Pleiman
Deb Prater
Veronica Presas
Karen Fortman, O.D.
Mike and Patti Puckett
Frank and Illean Ratermann
Matt and Jane Ratermann
Chris Ratermann
Gary Reed
Adam and Diane Reiss
Charlie and Ann Rhyhan
Bob Riethman
Larry and Nancy Roettger
Dave Ross
Tom and Lisa Alvetro-Rossman
Donnajean Ruble
Dave and Lisa Ruhenkamp
Bob Sargeant

A Community Grant supported Conservation Day Camp's Space theme by providing a mobile planetarium from the Boonshoft Museum.



Jay and Elaine Sargeant
 Jeff and Nancy Sargeant
 Marsha Sargeant-Jarvis
 Randy and Kathy Schafer
 Norma R. Schlagetter
 Elmer and Carol Schlater
 Jeff and Terri Schlater
 Ken and Brenda Schlater
 John and Colleen Schmitt
 Richard and Linda Scott
 Tim and Kathy Sell
 Bill and Marina Shaw
 Tom and Sandy Shoemaker
 Robert and Connie Shoenfelt
 Jinny Shreves
 Steve Shuchat
 Sidney Manufacturing Company
 Eric and Danielle Sielschott
 Eric and Gay Smith
 Lynn and Charlotte Smith

Juli Smith
 Norm and Jean Smith
 Dennis and Rita Sollmann
 Jeramie and Kara Sollmann
 Butch and Jan Sparks
 Marian Spicer
 Scott and Cheryl Spinner
 Steve and Lynne Springer
 Tim and Sarah Stammen
 Donald L Stephan
 Joe and Bonnie Sturm
 Frank T. Thaman
 Jim and Ginny Thompson
 Mike and Terri Thompson
 Michael and Teresa Trygstad
 Frank and Bonnie Turner
 Gerry and Jane Ulrich

Jane Van Fossen
 Jeff and Libby Van Treese
 Ronald * and Hertha Vice
 John and Karen Vornholt
 Mark and Jane Wahl
 Rich and Susan Wallace
 Brooks and Judy Ware
 Dan and Nita Watercutter
 Aaron Watkins
 Tom and Polly Watkins
 Todd and Julianne Weigandt
 Dave and Denise Welker
 Mark Wells

Tony and Karen Wendeln
 Tom and Judy Westerheide
 Maggi Williams
 Gary Wilson
 Greg and Priscilla Wilt
 Tony and Judy Wolf
 Amy Zorn

Legacy Society

The Community Foundation of Shelby County helps you do good works forever. The Legacy Society members noted below have notified us regarding a gift from their estates to benefit a cause or organization they value. Thank you for your generosity!

Anonymous (3)
 Douglas Wilson Allinger*
 Dorothy A. Barker*
 Roscoe P. Beanblossom*
 Betty Z. Bennett*
 Rodney R. Blake*
 Wayne E. Borland
 George Brockman*
 Linda McReynolds Bryant
 Lola Detrick Carmony*
 Jack and Connie Davis
 Eugene P. Elsass*
 Ruth Bennett Emmons*
 Dave and Kathy Fogt

Harold and Lelah Fogt*
 Edmund Richard Garlow*
 Vera D. Ginn*
 George Groff*
 Mary Gross*
 Larry Hawkins
 John G.* and Margaret E. Humphris
 Phil and Bev* Lahrmer
 Irving Linet*
 John D. Long*
 Tom and Angela Martin
 Dorothy A. Meyer*
 Doug Millhoff
 Patrick and Carol Milligan*

Joe* and Katy Monnier
 Gary W. Partington*
 Mary E. Patterson*
 Dave Ross
 Dennis* and Donnajean Ruble
 Bob and Thelma* Sargeant
 Herbert and Antoinette Schlater*
 Louise Sheets*
 Kent R. Smith*
 Ethel Watkins*
 Stephen W. Weadock*
 *deceased

A gift may be made through a statement in your will or by designating the Community Foundation as a beneficiary of an IRA or life insurance policy. Your attorney or financial advisor can assist you in making a gift that is most advantageous to your personal situation.

Please let us know if you have planned a gift. You need not share specific details, but we would like the opportunity to clarify how you wish the gift to be used. Please contact Jessica Fortkamp, Donor Relations Director at (937) 497-7800.

Investing in Your Community

Charitable Funds are created in many ways. Some have a single donor or family. Others are created by dozens of people who believe in the cause, project or organization benefitting from the fund. Donors from throughout Shelby County and beyond have established more than 215 charitable funds. The map to the right indicates the communities benefitting or creating a charitable fund, including many funds whose purpose is county-wide or beyond the county borders.

Countywide Funds (41)
Outside Shelby
County Funds (15)

• Botkins (16)
Jackson Center (1) •

• Anna (5)

SHELBY COUNTY,
OHIO

• Ft. Loramie (22)

• Sidney (93)

Houston (5)

Fairlawn Area (3) •

• Russia (19)



Dennis Ruble Memorial Fund

Dennis Ruble was passionate about giving. Not just giving financially, Dennis selflessly gave of his vast knowledge in nonprofit management and fundraising. Several former

staff members became directors of other YMCAs. After his death in 2017, his friends and family created the Dennis Ruble Memorial Fund to give emerging leaders in area YMCA's training that would help grow their communities' Y's.

"We chose to honor Dennis Ruble for his leadership and dedication to the YMCA and to establish a vehicle to educate and encourage future leadership, something he felt strongly about," said Walt Bennett, Dennis's long-time friend and a founder of the Fund. "The hope is the Fund will assist in educating future and current leadership candidates and provide insight and development in skills that are needed to be successful. Our hope is this will be a factor in a future YMCA leader."

This year's grant went far beyond the plan of helping area Y's by supporting all Y's in Ohio to send their staff to the virtual state leadership conference...an impact that Dennis would have thought was tremendous. According to the Ohio Alliance of Y's, attendance more than doubled this Spring, with 562 staff from all Y's in Ohio represented. At a time when most Y budgets are strained, the Dennis Ruble Memorial Fund afforded the opportunity for strengthening staff skills.



Adam E. Huelskamp Scholarship Fund

4-H and FFA programs offer hundreds of kids each year the chance to learn about leading their clubs, completing tasks by a deadline and presenting a well-executed project to adults.

Active participation in these youth organizations is a key factor in a scholarship created to honor the memory of Adam Huelskamp.

Established by his sister Lesli Huelskamp in 2018, the Adam E. Huelskamp Scholarship Fund invites seniors and college students from Shelby, Auglaize and Mercer counties with backgrounds in 4-H and FFA to apply for two \$1,000 scholarships.

"Adam was always a very helpful person, so I wanted to continue his ways to honor his memory," shared Lesli. "He loved farming, so giving funds to those active in 4-H and FFA just seemed to fit."

Scholarship funds are often created by one donor with a single gift and other times by many donors with multiple gifts. A common thread is a desire to help others. Adam also embodied that desire and Lesli decided that it was a thread that should not be broken. The Fund has received gifts from many family and friends and benefits from food sales from the Adam's Apple Café at the Shelby County Fair, operated by Lesli.

Students apply for the scholarship through the Community Foundation's applications for high school seniors and college students.

New Choices received a grant to buy a van to transport domestic violence victims to jobs, court, doctors appointments and other places. In the past, staff members had to use their private vehicles for such trips.



Storywalk takes books to a trail at Tawawa.

Shelby County Libraries Foundation

More than 220,000 visitors use the Shelby County Libraries' services online or at one of its six locations in Anna, Botkins, Fort Loramie, Jackson Center, Russia and Sidney. The Shelby County Libraries Foundation intends to keep our local library system evolving its spaces and offerings as interests change.

"The Amos Memorial Public Library created its own foundation in the 1980's when library funding was becoming unstable and the ability to raise money and place the funds in a foundation was a solid option," recalls Library Executive Director Suzanne Cline. "This foundation, however, was never active. It wasn't until after our campaign for the renovation and addition to the Amos Memorial location, that the Library Board determined it was time to revive the Library Foundation and it was placed within the Community Foundation."

Another factor was that, as a public entity, investment opportunities are limited to public funds. By creating the Shelby County Libraries Foundation within the Community Foundation, any new gifts have the ability to be invested in the market for greater return.

"Libraries are continuously changing to meet the needs of the community. We are still in the business of books and reading materials that are hardcopy items, but have also added a lot of digital content, training and meeting spaces and educational databases to continue to meet the needs of residents."

Schmiesing Family Fund



Greg and Chrissy Schmiesing

Greg and Chrissy Schmiesing place a high priority on charitable giving. They use a donor advised fund that they named the Schmiesing Family Fund to organize and focus their giving.

"There were two motivations that spurred us to action," said Chrissy. "First was the witness of generous people we knew in the community who had established funds, and the realization that these funds are useful and effective, even if you are not on any lists of world's wealthiest people. Second, tax changes made 'bundling' of giving

important to maximize the amount of money available to give to organizations that we are confident are using the gifts efficiently for causes that we support."

Bundling is a strategy whereby an individual or couple doubles up on charitable tax deductions and itemizes one year, then minimizes charitable gifts the following year when the standard deduction is taken. The donor advised fund receives bundled gifts, then issues grants to your favorite charities throughout the time ensuring support from you is uninterrupted.

"Giving is important because we know that 'the goods of creation are intended for the whole human race,'" added Greg. "We believe that voluntary giving is the most efficient and effective way to make sure the goods of creation provide for all of us, and that giving provides the greatest benefits to the giver as well as the recipient."

Creating a Fund

A charitable fund carries out your wishes. Here's how it works and what you can expect from us.

Fund Agreement We work with you to create an agreement specifying the fund's name and purpose and whether gifts are to be retained or spent. Template agreements are available for any of the Fund Types noted to the right. Dormant fund agreements may also be created now and then activated by a gift from your Will or other estate document.

Gifts There are many gifts options, but only you and your tax advisor should decide which is most advantageous to you. Please see page 13 for common types of gifts. Charitable funds may receive all gifts up front, over time or through your estate. Most funds must have an asset size of \$25,000 or more. The larger the fund, the more it can return to the community.

Grants Some funds, such as donor advised funds, may issue grants periodically, as you request. Others disburse annually, such as scholarship funds. Still others receive proposals from charities seeking support for their work. Grants may be issued anywhere in the U.S. and typically to qualifying not for profit organizations and educational institutions.

Investment Most charitable funds are invested in one of three portfolios to enable earnings and growth. Our ability to administer multiple charitable funds allows us to comingle them for greater investment diversification. Project Funds and Gift Accounts are not invested.

Fees The Community Foundation's operations are supported by fees assessed to charitable funds we administer. Please contact the office to request a copy of the Fee Schedule.

Fund Statements Monthly reports are provided to those who are authorized. A password protected, online portal is also available, which allows viewing of the fund's activity at any time.

Ongoing Connection to Staff The staff considers it a privilege to assist you with your charitable giving. We welcome calls, emails and visits any time you have a question, need copies of Gift Acknowledgements or want to explore an aspect of benefiting the community. We are your resource!

FUND TYPES

Community Granting Meets a wide range of charitable purposes. This fund is flexible and responsive to changing community needs. Local volunteers appointed by the CFSC award grants based upon proposals submitted.

Field of Interest Awards grants to benefit causes or geographic regions you favor. Grants are awarded based upon proposals received and reviewed by local volunteers appointed by the CFSC.

Donor Advised Allows you to stay involved by recommending grants from the fund you established.

Gift Account A short-term Donor Advised Fund. Grants are made from principal (gifts).

Scholarship Assists students with the cost of their college education or vocational training.

Designated Assists charitable organizations specified when the fund is created.

Organization Established by a charitable organization to provide for its ongoing support.

Project Accomplishes community or capital projects. Receives gifts raised to pay for a specific project.

Supporting Organization Similar to a Donor Advised Fund but with more independence.

A grant to *Wrapped in God's Love* supported materials to make blankets for Wilson Hospice and Catholic Social Services. Miah and Cynthia are volunteering as part of a confirmation project with their church.



Charitable Funds

Thank you for providing for the long term enhancement of our community. Charitable funds are vehicles that enable you to support the initiatives, organizations and causes most important to you. *Please see page 7 for an explanation of Fund Types.*

Community Granting Fund

Community Impact Fund

Designated Funds

Nancy Adams Training Center Fund
Betty Zorn Bennett Fund
William Binkley Pavilion Fund
Ft. Loramie Education Foundation General Fund *FLEF
Ft. Loramie Village Parks Fund
Reese C. Gross Fund
Hall of Honor Fund *SCSF
The Memory Fund

Mary E. Patterson FCCLA & FFA
Endowment Fund *HHLFSF
Prime the Pump Fund:
In Loving Memory of Alma Wilson Allinger and
Robert Lochard Allinger
Sidney Memorial Stadium Turf II Fund
Kent R. Smith Fund
SFC Robert E. Smith Fund

Donor Advised Funds

4 Sons Family Foundation
Kurt and Connie Barhorst Fund
Donald & Evelyn Bensman Foundation
Edward and Marilyn Borchers Family Foundation
Douglas and Elizabeth Borchers Family Foundation
Lori Lee Bricker Clinehens Memorial Fund
John E. Coffield Fund
Gary and Madeleine Daniel Family Foundation
DEB Fund
Village of DeGraff Fund
Robert and Sondra Dunham Foundation
Eagle Bridge Charitable Fund
Phillip R. and Emily Shaw Esau Fund
Douglas and Jessica Fortkamp Family Foundation
Delbert 'Doc' and Hilda Francis Family Foundation
John S. and Julia K. Frantz Family Foundation
Richard R. & Gail P. Frantz Family Fund
Mark and Jacqueline Fullenkamp Family Foundation
Nick and Stephanie Fullenkamp Family Foundation
Philip and Katrina Gilardi Family Foundation
Kauffman Family Foundation

Keister Family Foundation
Kermit T. Kuck and Ella M. Kuck Fund
Tom and Angela Martin Family Fund
Monarch Machine Tool Company Legacy Fund
Dave and Ann Monnier Family Foundation
Dale and Kathy Nichols Family Foundation
Glen and Vanis Phillips Family Fund
Tom and Jana Potts Family Foundation
Right Hand Fund
Dennis Ruble Memorial Fund
Russia Wellness Foundation
Robert and Thelma Sargeant Fund
John and Jeanette Sargeant Family Foundation
Ken and Brenda Schlater Foundation
Schmiesing Family Fund
Richard and Linda Scott Family Endowment Fund
Tom and Sandy Shoemaker Fund
Sidney-Shelby County Chamber Foundation
Norman and Jean Smith Family Fund

Charitable Funds

Field of Interest Funds

Roscoe Beanblossom Fund
F.I.S.H. Fund
John Douglas Long Blind Fund

Organization Funds

Agape Distribution Fund
Alpha Community Center Fund
Big Brothers Big Sisters of Shelby and Darke County Fund
Botkins Education Foundation General Fund *BEF
Botkins Local School Fund
Compassionate Care Free Clinic Fund
Compassionate Care of Shelby Co Endowment Fund
Habitat for Humanity of Miami and Shelby Counties, OH Fund
Historic Sidney Theatre Fund
New Choices Fund
Operation Rebirth Fund
RACK Fund
Rustic Hope Fund

Project Funds

Anna Splash Pad Fund
Building a PAWsitive Future Fund
Mercy Mission House Emergency Shelter Fund
Raise the Roof for the Arts Campaign Fund

Scholarship Funds

John and Victoria Albers Memorial Scholarship Fund *FLEF
Don and Helen Ambos Memorial Scholarship Fund *BEF
Scott F. Barker Memorial Scholarship Fund *SCSF
Botkins High School Class of 1965 Scholarship Fund *BEF
Carol Becker Memorial Scholarship Fund *BEF
Laura Behr Memorial Scholarship Fund
Ben-Med Scholarship Fund *FLEF
Harry Emley and Mary Joslin Bennett Scholarship Fund *SCSF
Edward and Marilyn Borchers Family Scholarship Fund
Douglas and Elizabeth Borchers Baseball/Softball Scholarship Fund
Douglas and Elizabeth Borchers University of Dayton Scholarship Fund
Joe and Mary Borchers Memorial Scholarship Fund *FLEF
Homer and Mary Lou Bornhorst Family Scholarship Fund *FLEF
Botkins Area Community Fund
Botkins Student Memorial Scholarship Fund *BEF
Botkins Trojans Scholarship Fund
Marty Bowman Football Academic Scholarship Fund *SCSF
Donald and Ruth Brown Scholarship Fund *BEF
Lola Detrick Carmony Scholarship Fund
Davis-Blackford Families Scholarship Fund
Jim and Pat Dietz Scholarship Fund *BEF
Doc and Hilda Francis Family Scholarship Fund
Chase Fultz Memorial Scholarship Fund *BEF

Ruble Family Keep Art in Your HeART Fund
Louise Sheets Fund
Shelby County Medical Services Fund

S & H Products Fund
Samaritan Works Fund
Senior Center of Sidney-Shelby County Foundation
Shelby County Arc Fund
Shelby County Historical Society Fund
Shelby County Libraries Foundation
Shelby County United Way Legacy Fund
Sidney Alive Fund
Sidney City Schools Foundation *SCSF
Sidney First United Methodist Church Fund
Sidney Rotary Charitable Fund
Sidney-Shelby County YMCA Fund
Wilma Valentine Childcare Fund
Wilson Health Foundation Fund

Redskin Memorial Park Fund
Sidney Athletic Center Fund
Sidney Inclusive Playground Fund

John Gephart "G5" Memorial Scholarship Fund *FLEF
Vera DoLean Ginn Kiwanis Scholarship Fund
Thomas E. Given Family Scholarship Fund *SCSF
Randy Greve Scholarship Fund *BEF
Robert E. Grubbs Foundation
Larry Hawkins Family Scholarship Fund
Adam E. Huelskamp Scholarship Fund
Betty Lee Riggs Hughes Nursing Scholarship Fund
James P. Humphrey Sidney-Shelby County Black Achievers Scholarship Fund
IUTIS Club Scholarship Fund
Kauffman Family Scholarship Fund
Donald E. and M. Jane Kemp Trade School Scholarship Fund
Kiwanis Club of Sidney Scholarship Endowment Fund
Emory and Nelda Koenig Family Scholarship Fund *BEF
Lachey Family Scholarship Fund
Lahrmer Family Scholarship Fund
Elaine Laughlin Scholarship Fund
Law Student Assistance Fund
Layton Family Foundation
Dr. Edward and Anne Link Fund
Kyle R. Magoto Scholarship Fund
Virginia and Richard Matz Scholarship Fund
Madeline Maurer Scholarship Fund *FLEF
Medical and Health Professions Scholarship Fund

Sidney-Shelby County YMCA Youth STEM Club members are hands on with robotics thanks to a Monarch Machine Tool Company Legacy Fund grant.



Scholarship Funds (cont'd)

Brad Meyer Baseball Memorial Scholarship Fund *FLEF
Hugo and Thelma Meyer Memorial Scholarship *FLEF
Leo J. Meyer Scholarship Fund *FLEF
Dave and Connie Mielke Scholarship Fund *BEF
Catherine Moloney Nursing Scholarship Fund
Clair and Jeanne Naveau Family Scholarship Fund
Heidi Norris Fund
Irene Palko Scholarship Fund
Waneta Ammon Partington Scholarship Fund
Mary E. Patterson Scholarship Fund *HHLSF
Paul and Veronica Perin Scholarship Fund *FLEF
Urban and Pauline Ratermann Family Scholarship Fund *FLEF
Red and Black Scholarship Fund *FLEF
William A. Ross, Jr. Family Scholarship Fund
The Ruese Insurance Agency, Inc. Scholarship Fund
Bob Sargeant Skills Scholarship Fund
Robert and Thelma Sargeant Scholarship Fund
Thomas E Schafer Scholarship Fund *FLEF

Thomas E Schafer Skills Scholarship Fund *FLEF
Herbert and Antoinette Schlater Scholarship Fund
James F. and Marcia L. Schulze Scholarship Fund *FLEF
Louise Sheets Scholarship Fund *BEF
Shelby County Youth Soccer Scholarship Fund
Tom and Sandy Shoemaker Scholarship Fund
Tom and Sandy Shoemaker Skills Scholarship Fund
Sidney High School Alumni Scholarship Fund
Sidney Moose Lodge 568 Scholarship Fund
Woody Sturm and Sturm Family Scholarship Fund
William and Bonnie Swonger Scholarship Fund
Stephen W. Weadock Scholarship Fund
William and Patsy Zorn Veterans Scholarship Fund

Supporting Organization

Donald & Evelyn Bensman Foundation

**Affiliated with a group of funds*

BEF - Botkins Education Foundation
FLEF - Ft. Loramie Education Foundation
HHLSF - Hardin-Houston Local School Foundation
SCSF - Sidney City Schools Foundation

How to Contribute to a Fund

GIVE BY CREDIT CARD

1. Visit www.commfoun.com and click the "Donate" button in the upper right corner of the screen.
2. Enter your gift amount and select the appropriate fund from the drop down menu. Add your information and continue as prompted.
3. Complete your transaction using a major credit card or your PayPal account. Please note that credit card gifts incur a processing fee of approximately 2.5% of the gift amount.

GIVE BY CHECK

1. Make your check payable to 'Community Foundation of Shelby County' and write the intended fund's name on the memo line or an accompanying note.
2. **Mail your gift to:**
Community Foundation of Shelby County
100 S. Main Ave, Ste 202
Sidney, Ohio 45365

Please see page 13 for other ways to give.

2020 Audit Summary

Please contact the Executive Director to view a copy of the Community Foundation of Shelby County's 990 (with certain omissions to protect donor privacy), 990-T (available only for years in which it is filed), audited financial statements, investment information or IRS exemption letter.

FINANCIAL STATEMENTS

Combined Statement
of Financial Position,
December 31, 2020

ASSETS

Cash and Equivalents	\$ 3,023,981
Contributions Receivable – Project Funds	71,177
Investments	36,236,613
Property and Equipment	61,770
Other Assets	601

TOTAL ASSETS	\$ 39,394,142
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LIABILITIES

Grants Payable	\$ 333,331
Accrued liabilities	21,968
Notes and interest payable on behalf of others	54,676
Assets held in trust for others	9,665,019

TOTAL LIABILITIES	\$ 10,074,994
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NET ASSETS

Unrestricted	\$ 29,319,148
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TOTAL NET ASSETS	\$ 29,319,148
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TOTAL LIABILITIES AND NET ASSETS	\$ 39,394,142
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Combined Statements
of Activities,
December 31, 2020

REVENUES GAINS & SUPPORT

Contributions	\$ 2,033,578
Net Investment Income (Loss)	3,019,754
Fund Management Fees	240,114
Proceeds From PPP Loan	50,727

TOTAL REVENUE	\$ 5,344,173
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EXPENSES

Program Activities	\$ 2,083,923
Fundraising Costs	109,980
General & Administrative	215,961

TOTAL EXPENSES AND DISBURSEMENTS	\$ 2,409,864
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CHANGE IN NET ASSETS	\$ 2,934,309
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ASSETS, BEGINNING OF YEAR	\$ 26,384,839
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ASSETS, END OF YEAR	\$ 29,319,148
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Investment and Spending Policy

The Community Foundation invests most charitable fund assets. The primary objective of our Investment Policy is to provide for an optimal level of total return, in real terms after inflation, and long-term growth of capital, with an acceptable exposure to risk, while maintaining the ability to support distributions.

Investment consultant Clearstead of Cleveland provides analysis and reporting to the Foundation's eight-member volunteer Investment Committee. The Investment Committee reports to the Board, which sets and monitors policy.

Project funds and most short-term charitable funds are not placed investment pools, but instead remain in money market or checking accounts to better preserve all funds until they are disbursed.

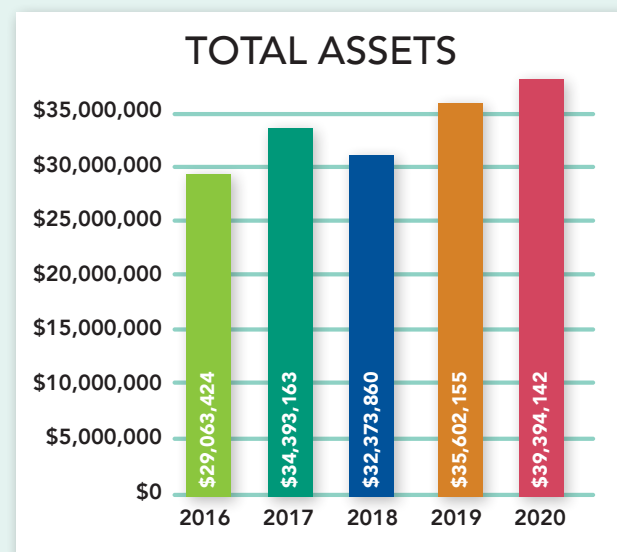
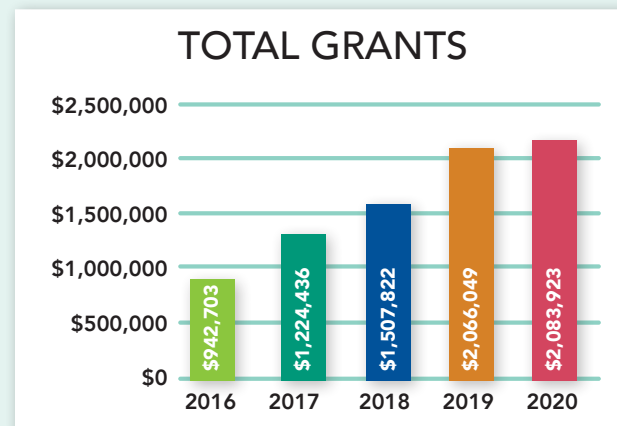
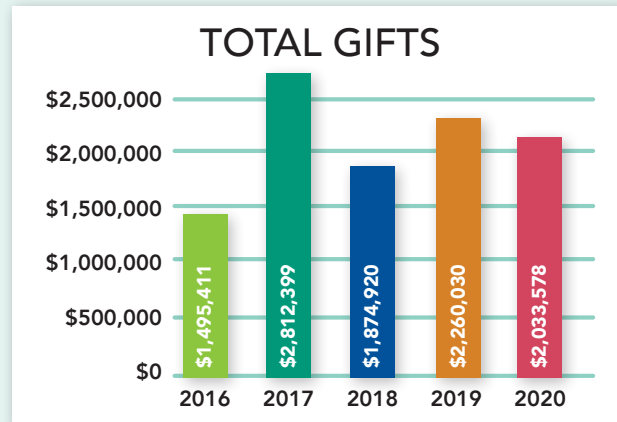
Find investment reports in the 'Who We Are' section of the Foundation's website at www.commfoun.com.

Spending Policy

Endowed funds, meant to support the community forever, follow a Spending Policy. The Policy averages a fund's balance from the prior 16 quarters and multiplies the average by a percentage to determine the amount of annual grant dollars. Using the Spending Policy, a charitable fund keeps excess market return in favorable times and continues grant awards in unfavorable times, within certain parameters. The overall goal is that the charitable fund balance and the annual grant amount increase over time. Each investment pool has its own spending rate.

Non-endowed funds do not follow the Spending Policy, as those funds have the ability to disburse total return and principal.

Historical Activity



Ways to Give

The mission of the Community Foundation of Shelby County is to cultivate, administer and distribute legacy gifts for the benefit of our community. In most cases, we carry out the legacy of people who provide a gift meant for long-term or permanent use within the Shelby County area.

While we welcome your gifts that will add to any existing fund, we also can assist you in creating new funds that carry out specific charitable purposes.

Giving Options

During life or through your estate, there are many options to make a gift in a way most advantageous to your personal situation. As a 501(c)(3) public charity, gifts are deductible at the highest levels allowed by law. Please contact Jessica Fortkamp, Donor Relations Director at jfortkamp@commfoun.com or (937) 497-7800 with questions or to request a copy of our Gift Acceptance Policies for General, Real Estate or Life Insurance gifts.

Cash – An online credit card gift or a check made payable to the Community Foundation of Shelby County is very easy. Note the name of the intended fund on the check's memo line to ensure your gift is correctly credited. See page 10 for gifting details.

Public Securities – The fair market value of transferred shares is deductible, up to 30% of your yearly adjusted gross income. You may avoid capital gains on appreciated stock and mutual funds when we receive and sell the shares. You may also transfer privately held stock, so long as certain requirements are met.

Real Estate – The Community Foundation can accept qualifying gifts of residences, farm land, commercial property and undeveloped land. In most cases, such gifts are sold and the proceeds benefit a charitable fund.

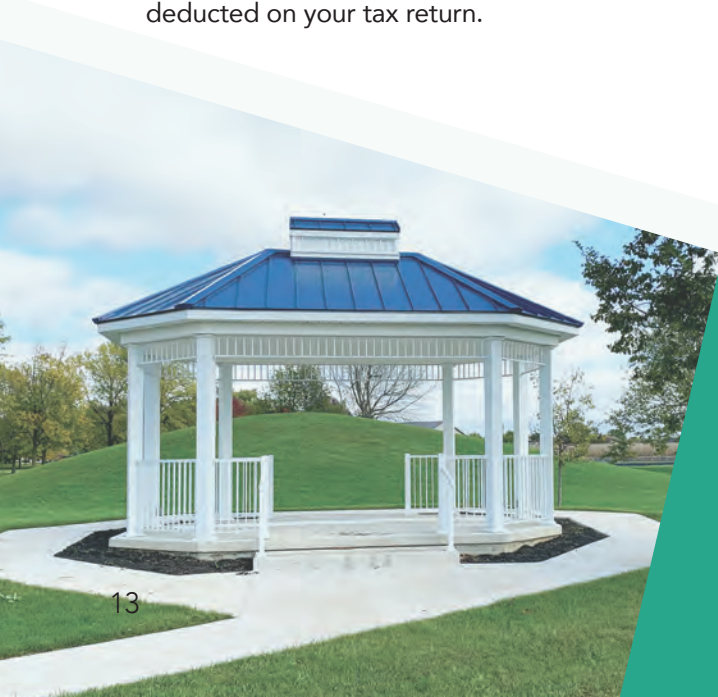
Grain – Transferring ownership of grain enables farmers to give without incurring taxable income from the sale of the commodity. The cost of production may still be deducted on your tax return.

Life Insurance – An easy way to make a significant gift! Consider transferring ownership of an unneeded policy or developing a new policy to benefit the community in the future. Depending upon the policy, you may deduct the cash value or ongoing premium payments. You may also make the Foundation a primary or secondary beneficiary of your life insurance.

IRA – Are you at least 70½? Your Individual Retirement Account (IRA) may transfer up to \$100,000 a year to the Community Foundation to benefit most types of charitable funds, excluding Donor Advised Funds. The IRA gift is non-deductible, but you benefit from avoiding income taxes on the disbursement.

Charitable Gift Annuities – A partially deductible gift to the Community Foundation that pays you or someone you designate a set amount each year for life. Any remainder held by us at the date of death adds to or creates a charitable fund, as you directed.

Charitable Lead Trusts and Charitable Remainder Trusts – Lead Trusts pay a fixed amount to the Community Foundation for a specified number of years with the remainder transferred to beneficiaries you name. Remainder Trusts, pay you or your designee for life with the remainder benefitting the Community Foundation. Both types provide you with tax benefits.



A new gazebo in Russia was made possible with the help of grants from a donor advised fund.

CFSC Trustees and Staff

Our board of trustees is comprised of Shelby County natives and long-term residents who value the principles, work ethic and community spirit found here. The board's role is to be active stewards in the investment and distribution of charitable dollars, ensuring that each charitable fund stays on the path indicated by the establishing donor or organization. Trustees are nominated by the current board of trustees and appointed by the Judge of the Shelby County Court of Common Pleas. Trustees may serve two five-year terms.



Cindy Helman



Mike Lochard



Karen Fortman



Dave Monnier

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 Dr. Karen Fortman, Secretary
 David Monnier, Treasurer
 Kurt Barhorst
 Janice Benanzer
 Doug Borchers
 Rudy Keister
 Diane Reiss
 Hon. Norman Smith
 Amy Zorn



Kurt Barhorst



Janice Benanzer



Doug Borchers



Rudy Keister

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info@commfoun.com
 and view our
 website at
www.commfoun.com

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 100 South Main Avenue
 Sidney, OH 45365



The Community
Foundation of
Shelby County

Suite 202
100 S. Main Avenue
Sidney, OH 45365-2771

What is the Community Foundation of Shelby County?

The Community Foundation of Shelby County is a 501(c)(3) public foundation administering many charitable funds created by local residents or organizations to support favorite causes and organizations.

Each charitable fund is given a name and purpose by the individuals, families, or organizations who establish it. Foundation trustees and staff abide by the purpose

of the charitable fund, making grants to specified causes or organizations in the name of the fund. We provide the administrative structure for funds including gift acceptance, asset investment, grant disbursement and federal and state filings. Most funds are intended to be perpetuating endowments, but some have a defined life span such as the completion of a community project.

COMMUNITY FOUNDATION OF SHELBY COUNTY

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Sidney, OH 45365
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The Louise Sheets Fund provided new landscaping at the Botkins Library location, giving it a fresh, welcoming look.